

CUSTOMER ID #	PROPERTY ID #
CITY	FIRE DISTRICT
EMPLOYER	
SPOUSE'S EMPLOYER	
SOCIAL SECURITY #	DATE OF BIRTH
SPOUSE'S SOCIAL SECURITY #	DATE OF BIRTH
HOME PHONE	WORK PHONE
<p>Social Security Number (SSN) disclosure is voluntary. The authority to require this number is given by 42 U.S.C. Section 405(c)(2)(C)(i). The SSN and all income information will be kept confidential. The SSN may also be used to facilitate collection of property taxes if you do not timely and voluntarily pay the taxes. Using the SSN will allow the tax collector to claim payment of an unpaid property tax bill from any state income tax refund that might otherwise be owed to you. Your SSN may be shared with the state for this purpose. In addition, your SSN may be used to attach wages or garnish bank accounts for failure to timely pay taxes.</p>	

**A. Information**  
Name and Address (please make corrections)

HELP: If you need assistance completing this form, you may come to the Tax Administration Office at 106 Hillcrest Dr, Sanford, NC 27330. Our office hours are 8:00 A.M. until 5:00 P.M. Monday – Friday. Or call (919) 718-4661 for the listing department.

To avoid a late list penalty, complete and return no later than  
January 31, 2009 to:  
PO Box 1968 Sanford, NC 27331

Personal Property Form on Reverse Side

**NOTICE:**

**INFORMATION CONCERNING PROPERTY TAX HOMESTEAD EXCLUSION FOR ELDERLY  
OR DISABLED AND CIRCUIT BREAKER DEFERMENT**

**B. Property ID:** \_\_\_\_\_ **Owner Name:** \_\_\_\_\_

If you have applied for Property Tax Homestead Exclusion for Elderly or Disabled Persons in past years, please update your Income information below. Enter your total income for the calendar year 2008 and attach verification. Income includes ALL money received other than gifts or inheritance from a spouse, ancestors or descendants.

Claimant's Income \_\_\_\_\_ Spouse's Income \_\_\_\_\_  
Signature of Exclusion Holder \_\_\_\_\_

**General Statute 105-277.1 Property Tax Homestead Exclusion For Elderly Or Disabled Persons:**

North Carolina excludes from property taxes a portion of the appraised value of a permanent residence owned and occupied by North Carolina residents who are at least 65 years of age or are totally and permanently disabled, and whose income does not exceed (\$25,600). The amount of the appraised value of the residence that may be excluded from taxation is the greater of twenty-five thousand dollars (\$25,000) or fifty percent (50%) of the appraised value of the residence. Income means all moneys received from every source other than gifts or inheritances received from a spouse, lineal ancestor, or lineal descendant. If you received this exclusion last year, you do not need to apply again unless you have changed your permanent residence. If you received the exclusion last year but the property no longer qualifies for any reason, please notify the assessor. Failure to notify the assessor that the property no longer qualifies for the exclusion may cause the property to be subject to discovery with penalties and interest pursuant to G.S. 105-312. If you did not receive the exclusion last year, but are now eligible, you may obtain an application from the county tax department. It must be filed with the county assessor by **June 1**.

**General Statute 105-277.1B Property Tax Homestead Circuit Breaker Deferment:**

North Carolina Defers a portion of the property taxes on the appraised value of a permanent residence owned and occupied by a North Carolina resident who has owned and occupied the property at least five years, is at least 65 years of age or is totally and permanently disabled, and whose income does not exceed (\$38,400). If the owner's income is (\$25,600) or less, then the portion of property taxes imposed on the residence that exceeds 4% of the owner's income may be deferred. If the owner's income is more than (\$25,600) but less than or equal to (\$38,400), then the portion of the property taxes on the residence that exceeds 5% of the owner's income may be deferred. The deferred taxes become a lien on the residence and the most recent three years of deferred taxes preceding a disqualifying event become due with interest upon one of the following disqualifying events: 1) the owner transfers the residence; 2) the owner dies; or 3) the owner ceases to use the property as a permanent residence. Multiple owners of a permanent residence must all qualify for the circuit breaker before a deferment of taxes will be allowed. You must apply for the opportunity to defer property taxes each and every year that you wish to defer taxes. The application may be obtained from the county tax department and it must be filed with the county assessor by **June 1**.

**Note:** An owner who qualifies for both the property tax homestead exclusion and the property tax homestead circuit breaker may elect to take only one of these forms of property tax relief.

C.

## TAX YEAR 2009 PERSONAL PROPERTY LISTING SECTION

**To avoid penalty, return no later than January 31, 2009.**

FOR OFFICE USE ONLY	ACCOUNT #	PPID #	CITY	FIRE	TOTAL PERSONAL

VEHICLES THAT ARE TAGGED/LICENSED THROUGH DMV ARE BILLED SEPERATELY

This section contains Personal Property that was listed for 2008. **Mark through any personal property that you no longer own.**

ITEM	OFFICE USE	ITEM	OFFICE USE

List any additional personal property that you owned as of January 1, 2009, that is not shown above. Personal property includes Mobile Homes, Boats, Motors, Jet Skis, other watercraft, Aircraft, Non-Licensed Vehicles including Antique and Classic Cars. **Do not list vehicles that are tagged/licensed with the DMV. (Attach additional information if necessary)**

YEAR	MAKE	MODEL	SIZE/HP	YEAR AQUIRED	TYPE	COST	NAME ON TITLE	VEHICLE ID #	OFFICE USE

FOR MANUFACTURED HOME OWNERS: \_\_\_\_\_ CHECK HERE IF YOU OWN THE LAND WHERE THE HOME IS SITUATED IF YOU DO NOT OWN THE LAND, PROVIDE THE LOCATION AND LAND OWNER'S NAME: \_\_\_\_\_

## D. Affirmation G.S. 105-310. 311

Under penalties prescribed by law, I hereby affirm that to the best of my knowledge and belief, this listing, including any accompanying statements, inventories, schedules, and other information is true and complete. (If this affirmation is signed by an individual other than the taxpayer, he affirms that he is familiar with the extent and true value of all the taxpayer's property subject to taxation in this county and that his affirmation is based on all the information of which he has any knowledge).

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

## E. REAL PROPERTY CHANGES

TAX YEAR 2009	OWNER:	PARCEL ID #
		DESCRIPTION

It is the taxpayer's responsibility to inform the Tax Assessor's Office of any changes to real property.

Complete this section if there were any changes to your real property between 1/01/2008 and 12/31/2008

Was there new construction, renovations, buildings demolished, burned or moved? \_\_\_\_ Yes \_\_\_\_ No

If yes, describe the changes including approximate cost (Use attachment if necessary):

\_\_\_\_\_ Cost \_\_\_\_\_

\_\_\_\_\_ Cost \_\_\_\_\_

## INSTRUCTIONS

A. INFORMATION: Please check all the information in the address and personal information section for accuracy. If any information is incorrect or missing, please make the corrections.

B. PROPERTY TAX RELIEF FOR ELDERLY AND DISABLED PERSONS: If you have received the exemption in past years, please update your income information. **If you are no longer eligible, you MUST notify the Tax Office.** If you are applying for the first time, you must file a complete application no later than **June 1, 2009**. Contact us for an application. (See notice under B for more information)

C. PERSONAL PROPERTY LISTING SECTION: Verify all of the information that is pre-printed and make any necessary corrections, additions or deletions.

D. AFFIRMATION: Sign and date the form. The form will be rejected if it is not signed by the owner or agent.

E. REAL PROPERTY CHANGES: If you have made any changes to your real property such as new construction, renovations, demolished or removed buildings, etc., please complete this section, giving complete information.

**If you need assistance with this form, contact our office at (919) 718-4661  
or in person at the Lee County Government Center, 3rd floor, 106 Hillcrest Dr, Sanford.**